Information Organization, Usability, Currency & Accessibility (IOUCA)
Meeting Minutes

Date: June 13, 2006
Time: 9:00 – 11:00 a.m.
Location: LC II, Room 340

Attendees:

☒ Linda Aguilar (DHS)	☒ Neal Albritton (DOR)	☐ Shayn Anderson (EDD)
☐ Steve Branson (DHS)	☒ Donna Freeman (FTB)	☐ Theresa Giles (DHS)
☒ Jennifer Harper (DHS)	☐ Jeff Hillard (CDFA)	☒ John Jewell (CSL)
☐ Patrick Johnson (DOR)	☐ Lee Macklin	☒ Anamarie Malone (DTS)
☒ Liz Mechem (Insurance)	☒ Frank Montez (DHS)	☒ Claudina Nevis (SCIO)
☐ Sally Nietering (POST)	☒ Joni Ogata (DMHC)	☒ Kristine Ogilvie (CSL)
☒ Bill Passavant (DSS)	☐ Rob Quigley (SCIO)	☒ John Quijada (DMV)
☒ Deborah Schwartz (CRB)	☒ Brenda Washington (DHS)	☒ Morris Weisbart (CDFA)

Review Minutes from Previous Meeting   Debbie Schwartz

The minutes for the June 6th meeting were approved with no corrections.

Portal Redesign Project Update   Claudina Nevis

Ann Brannen and Steve Rushing are assessing the project and determining their next steps. Many of the borrowed resources are returning to their departments. Anamarie will be working with HFI in a DTS capacity.

Status Updates – Recommendations to Review Board   Working Teams

General: It was recommended that documents originated by the IOUCA should note version number and adoption dates by Review Board and Steering Committee. In addition, a section should be added to the end of the recommendation showing the history of changes made to the document following submission to the Review Board. Debbie will make the changes to the template.

Recommendation should be sent to the Review Board as a single package. When complete, the working teams should send their final draft to Debbie. She will send them to the Review Board.

The working group discussed the need for a broader implementation plan than what is contained in the recommendation. It was felt that integrated document with next steps should be developed to guide implementation of the recommended standards. John and Debbie will work on this offline.

Accessibility: Neal distributed the draft recommendation to the working group. It is in progress but will be complete for the Review Board meeting on Friday.

Usabliity: Donna distributed the draft recommendation to the working group. It is in progress but will be complete for the Review Board meeting on Friday.

Style Sheets: Debbie distributed the draft recommendation to the working group. It is in progress but will be complete for the Review Board meeting on Friday.

State Portal Review Board Meeting   Debbie Schwartz

The State Portal Review Board meeting is scheduled Friday June 16 from 1:00 – 3:00 p.m. in Library & Courts, Room 340 (900 N Street). Neal will be out of town, but will participate by

conference call. Debbie will provide the phone number for the conference room. Claudina will estimate what time Neal should join the meeting.

Action Items   **Debbie Schwartz**

ACTION: The working group discussed the need for a broader implementation plan than what is contained in the recommendation. It was felt that integrated document with next steps should be developed to guide implementation of the recommended standards. John and Debbie will work on this offline.
Assigned To: Debbie Schwartz, John Jewell

Due: June 20, 2006 (Update)

Future Action Items (Not Scheduled for Review this Week)

ACTION: Develop a list of file types and versions that should be used for California web pages. The list should be prioritized by most desirable and focused on where we want to be in the future rather than where we are now.
Assigned To: Neal Albritton, Steve Branson

Due: June 20, 2006 (Update)

Update: Neal will start developing the list of accessibility requirements for Adobe products.

ACTION: Follow up on the feasibility of using Executive Institute as a vehicle for ongoing training for executives.
Assigned To: Claudina Nevis and Liz Mecham

Due: June 20, 2006 (Update)

Update: Claudina and Liz will determine how Executive Institute could serve as a vehicle for ensuring that executive management understands the business needs for accessible, usable websites as well as what needs to be done to achieve this.

ACTION: Develop a beginner's version of the workbook.
Assigned To: Neal Albritton

Due: June 20, 2006 (Update)

Update: The draft is complete; the working team will discuss and review the draft.

ACTION: Discuss a process for disseminating information to content providers and webmasters quickly. Prepare a plan to establish ongoing communication with webmasters.
Assigned To: John Jewell

Due: June 27, 2006 (Update)

Update: In progress.

ACTION: Follow up on the feasibility of using GTC as a vehicle for ongoing technical training.
Assigned To: Claudina Nevis and Liz Mecham

Due: October 10, 2006 (Update)

Update: Claudina met with the executive officer of GTC; they were very receptive to working with us. They are looking for some guidance from IOUCA; Claudina will follow up in October after the Web Accessibility Training is complete.

<u>Parking Lot</u>

1. *Frame the issue of application accessibility and usability.*
   Assigned To*: Steve Clemons*
   Due*: June 27, 2006 (Update)*
   Update*: It was noted that many online applications are written by consultants; the state may not have the necessary skills to make changes. It was suggested that the two parking lot items be considered as Phase 2. IOUCA will need to work closely with CEAP on the two items.*

2. *Conduct high level research and frame the issue of accessibility and usability in regards to online forms.*
   Assigned To*: Steve Clemons*
   Due*: June 27, 2006 (Update)*
   Update*: See above.*

<u>**Next Steps**</u>   <u>**Kris Ogilvie, Debbie Schwartz**</u>
Next IOUCA Meeting: June 27, 2006
                             Library & Courts II, 900 N Street, Room 340
                             9:00 – 11:00 a.m.

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Open Issues   **Debbie Schwartz**

1. How can the state design templates for current technology standards while accommodating departments with a wide range of expertise and software tools?
   The Review Board noted that some content management solutions can resolve this issue, but not all departments have strong content management systems in place. DTS is considering offering support. It was recommended at the IOUCA meeting on March 14th that we consider offering a resource gallery of images that can be used by any state department. It would be possible to offer a suite of templates using different color palettes that meet accessibility requirements. Before this can be decided, the issue of single look-and-feel for all California pages vs. multiple look-and-feel with common branding needs to be resolved at a higher policy level.

2. How can California enforce the standards after adoption? ***How will California ensure the application of standards across departments and over time (quality assurance)?[added 5/2]***
   California will likely approach adoption from an incentive perspective rather than an enforcement perspective. An exception is Section 508 compliance, which is mandated by state and federal law.

3. Should tools to implement standards (CSS, templates) be developed for current look and feel as well as new look and feels?

4. Guidelines are not always followed. Would it be better to develop standards only, but drive by level of compliance? For example,
   – Level 1 Standards: Minimal accessibility
   – Level 2 Standards: Moderate accessibility
   – Level 3 Standards: High accessibility

   Departments could be encouraged to work toward improving their websites by qualifying for higher levels. The state could provide "paths to accessibility" and could provide training for each level.

5. What skill sets will be needed to communicate, maintain, and implement the standards, guidelines, and tools the IOUCA is recommending?

6. How do we separate content from HTML (CSS only separates content from presentation)?
   This can be done through master templates in Dreamweaver, content management systems, or hard coding. The team needs to determine if this is part of our scope.

Parking Lot   **Debbie Schwartz**

3. *Frame the issue of application accessibility and usability.*

   Assigned To*: Steve Clemons*

   Due*: April 18, 2006 (Update)*

Update: It was agreed that these two action items are outside the scope of the IOUCA working group. We agreed that it was something we should be aware of. It was suggested that the two items be put in the parking lot for the time being and revisited in about a month.

4. *Conduct high level research and frame the issue of accessibility and usability in regards to online forms.*

Assigned To: Steve Clemons

Due: April 18, 2006 (Update)

Update: See above.

5. *Content authors may benefit from training and instruction in writing for the web. There is a need for training for content developers. It may be beneficial if the IOUCA could identify these training needs. DHS offers web author training for readability, usability, and targeting information to the specific audience.*